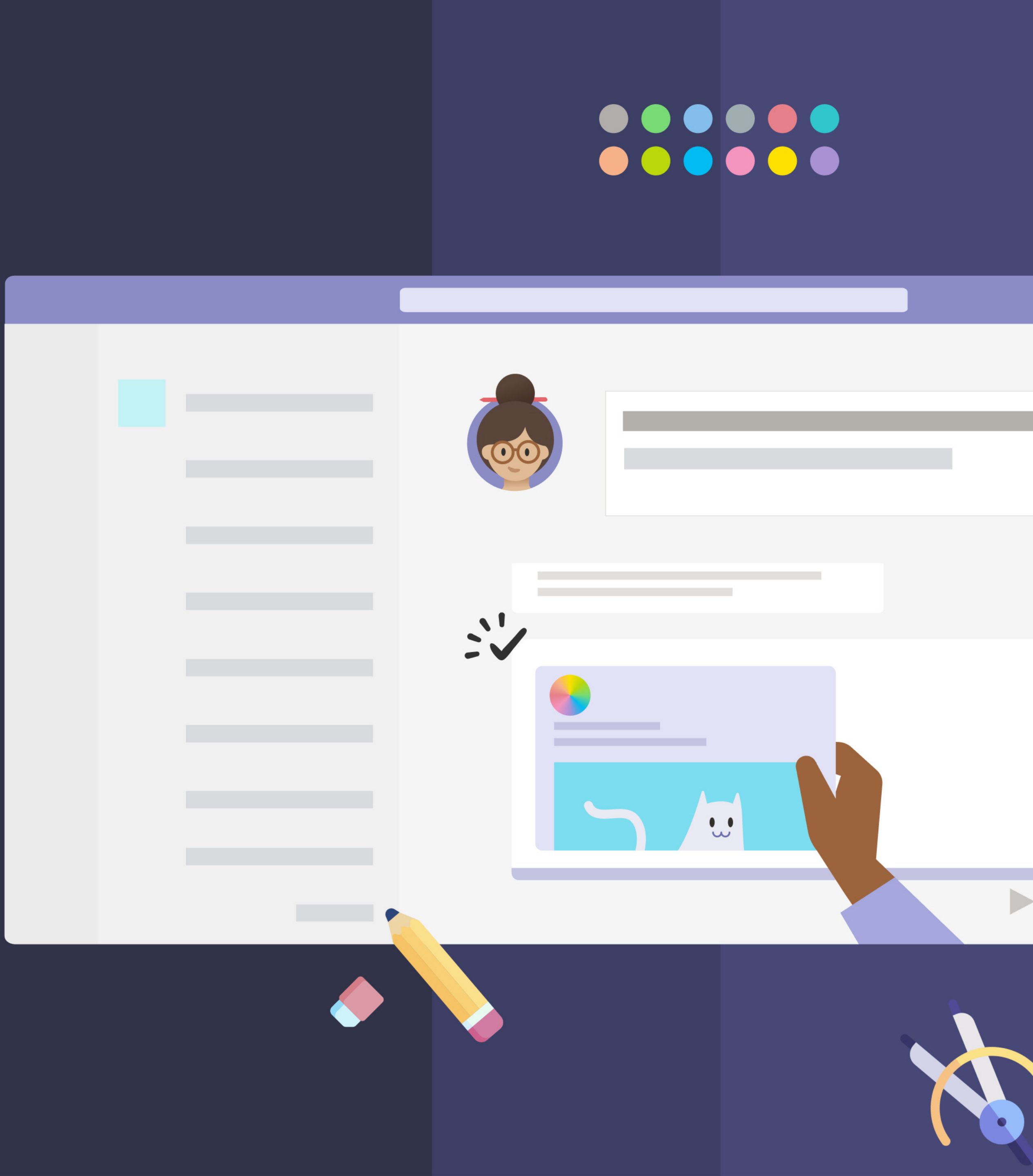
Microsoft Teams

# Best Practices

## Engaging customers on the Teams app



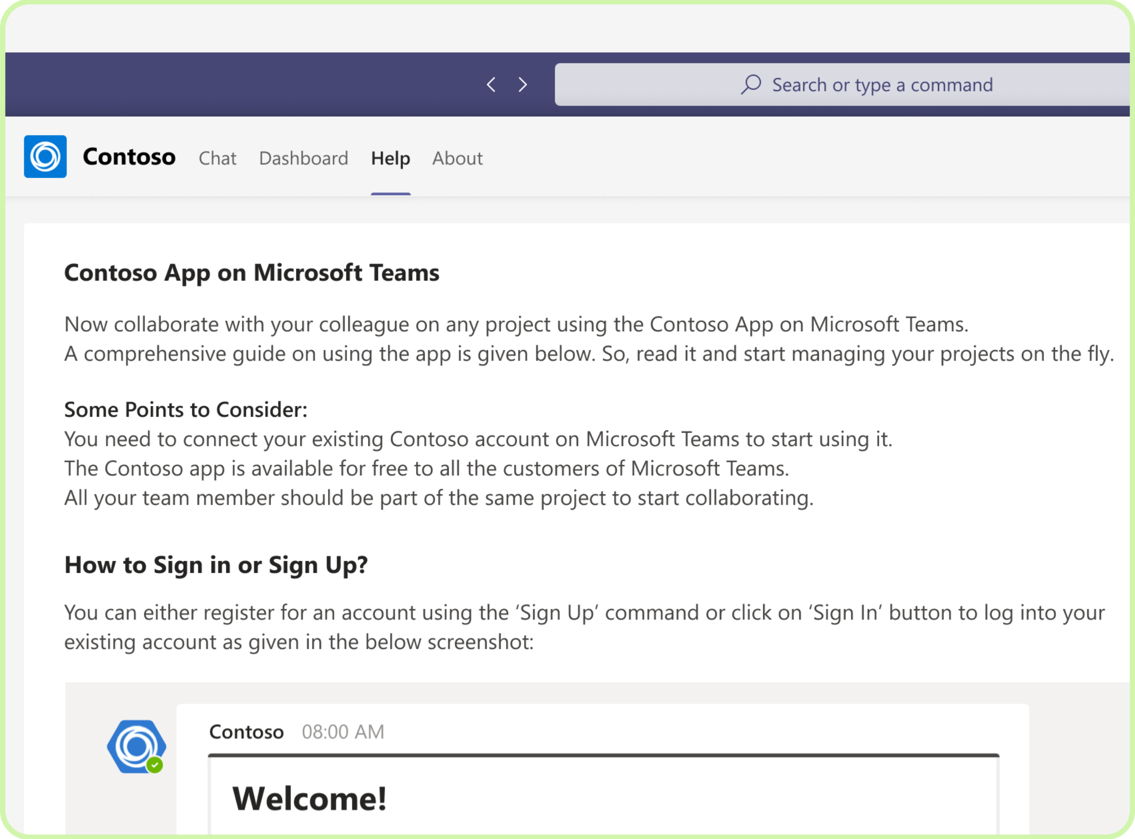
Teams Ecosystem

Microsoft Teams

Tip: 1

# Engage customers within Teams

# Engage customers



**Contoso App on Microsoft Teams**

Now collaborate with your colleague on any project using the Contoso App on Microsoft Teams.
A comprehensive guide on using the app is given below. So, read it and start managing your projects on the fly.

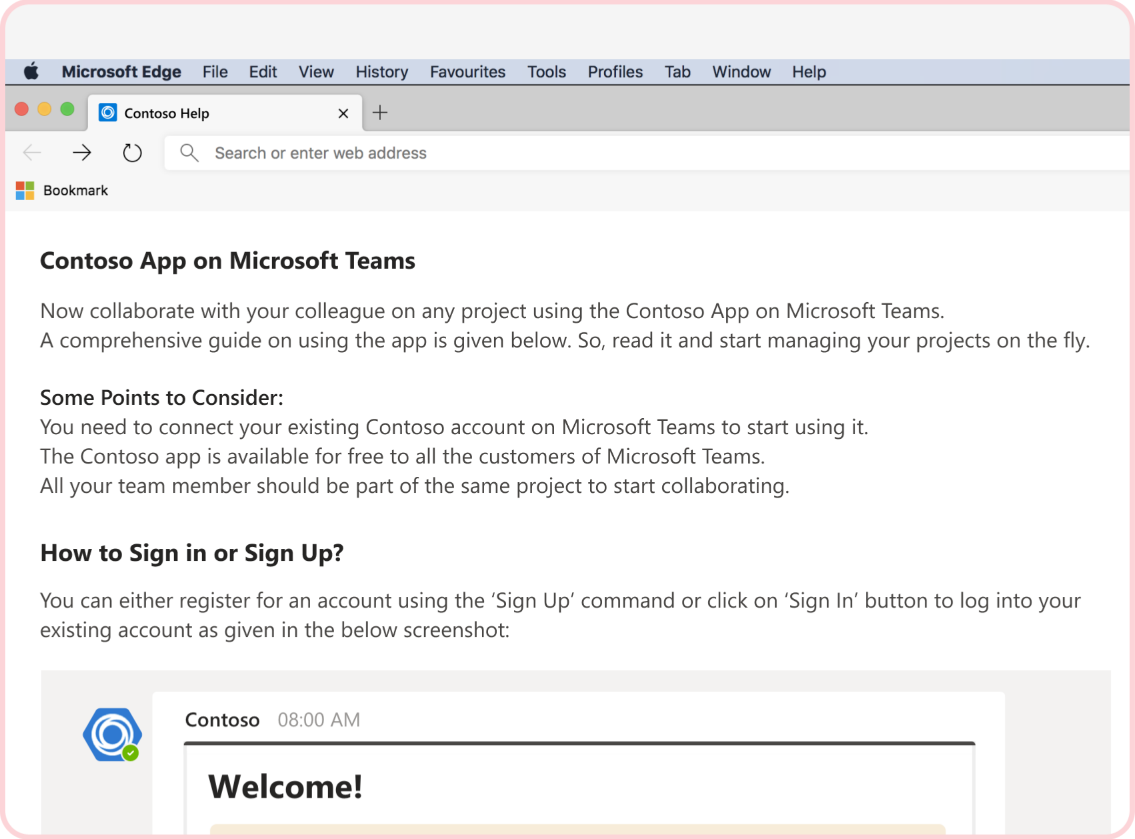
**Some Points to Consider:**
You need to connect your existing Contoso account on Microsoft Teams to start using it.
The Contoso app is available for free to all the customers of Microsoft Teams.
All your team member should be part of the same project to start collaborating.

**How to Sign in or Sign Up?**

You can either register for an account using the 'Sign Up' command or click on 'Sign In' button to log into your existing account as given in the below screenshot:

Contoso 08:00 AM

**Welcome!**



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**How to Sign in or Sign Up?**

You can either register for an account using the 'Sign Up' command or click on 'Sign In' button to log into your existing account as given in the below screenshot:

Contoso 08:00 AM

**Welcome!**

### ✓ Do: Use task modules or tabs

All core and non-core scenarios should be completed end-to-end inside the Teams experience. For instance, if a user clicks on a button or link for help, deep-link them to the help tab instead of opening a browser window of the help page on your website.

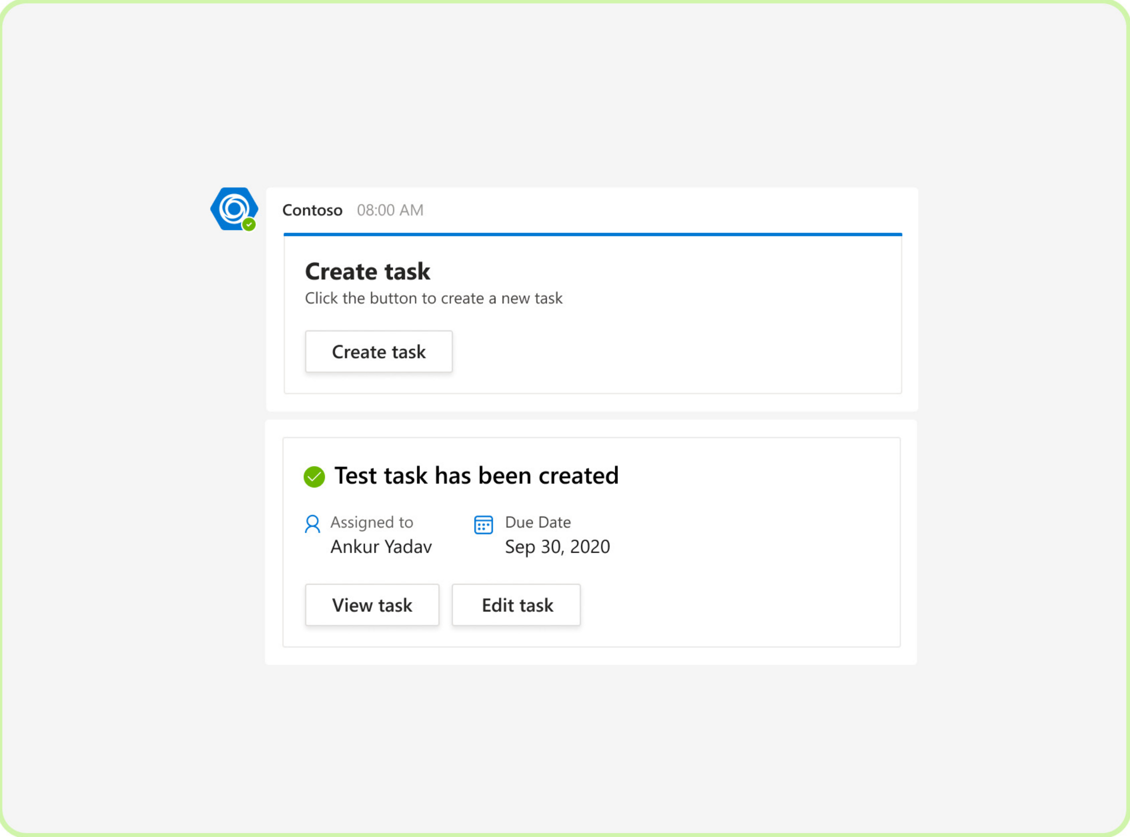
### ✕ Don't: Take users away from the conversation

Don't direct users to a web page outside Teams.

Tip: 2

# Always notify updates

# New updates



Contoso 08:00 AM

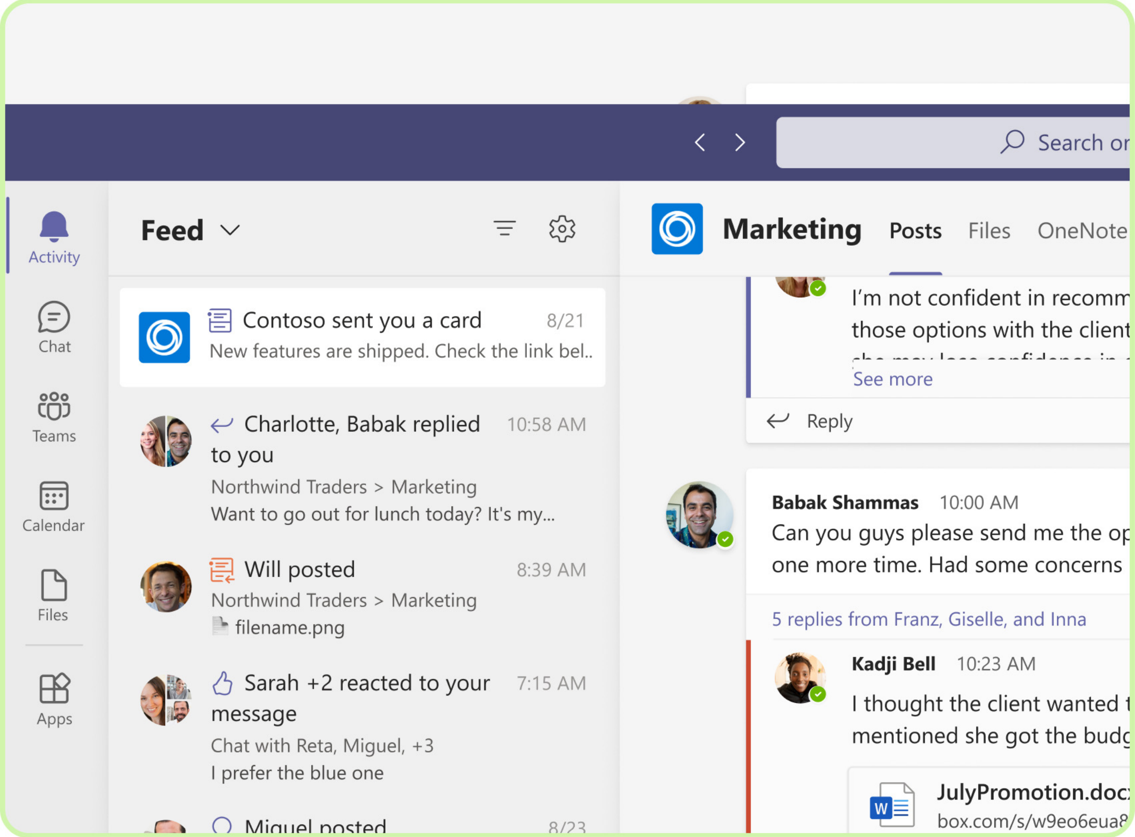
**Create task**

Click the button to create a new task

**Test task has been created**

Assigned to
Ankur Yadav

Due Date
Sep 30, 2020



Contoso sent you a card 8/21
New features are shipped. Check the link bel..

Charlotte, Babak replied to you 10:58 AM
Northwind Traders > Marketing
Want to go out for lunch today? It's my...

Will posted 8:39 AM
Northwind Traders > Marketing
filename.png

Sarah +2 reacted to your message 7:15 AM
Chat with Reta, Miguel, +3
I prefer the blue one

Miguel posted 8/23

I'm not confident in recomm
those options with the client

See more

Babak Shammas 10:00 AM
Can you guys please send me the op
one more time. Had some concerns

5 replies from Franz, Giselle, and Inna

Kadji Bell 10:23 AM
I thought the client wanted t
mentioned she got the budg

JulyPromotion.doc
box.com/s/w9eo6eua8

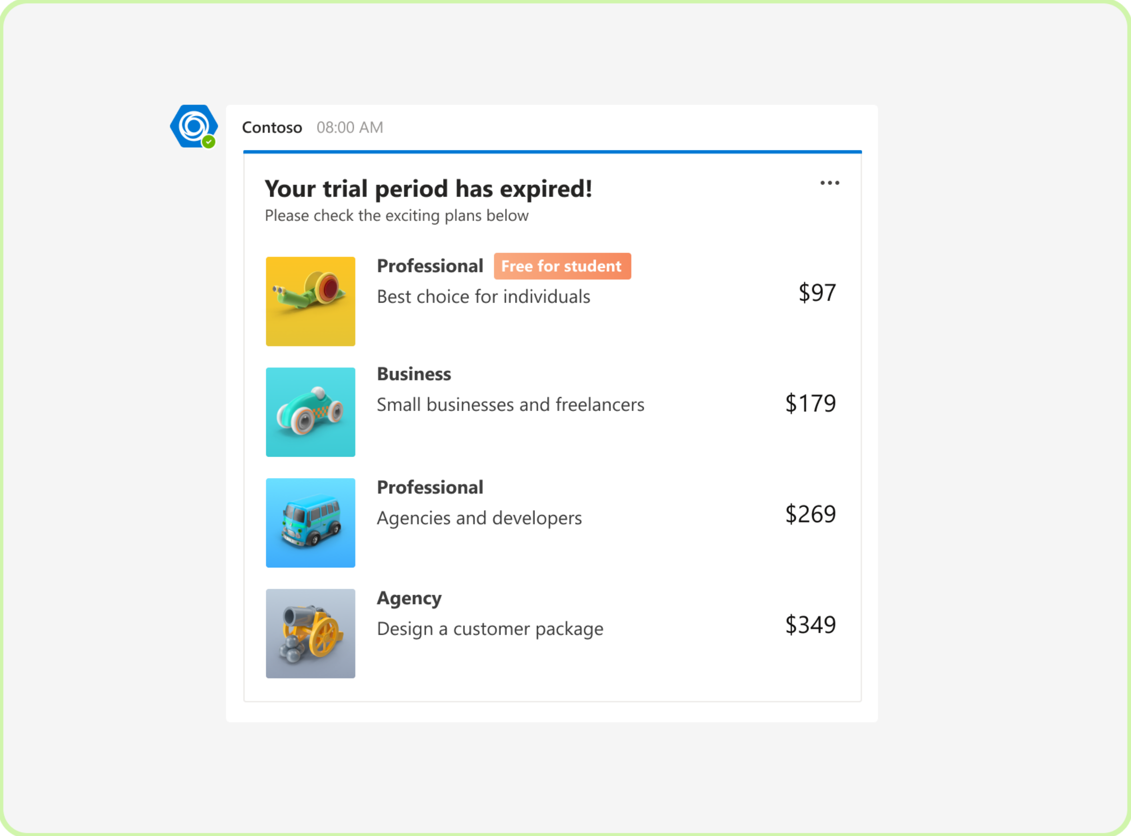
## Do: Always notify any relevant updates

Example 1: If there are any status changes in the app, do send a bot message to let the users know about it.

## Do: Always notify any relevant updates

Example 2: If you update your app, do inform your users about new features that have gone live in the form of a notification.

# New updates



Contoso 08:00 AM

**Your trial period has expired!**

Please check the exciting plans below

| | | |
|---|---|---|
| | **Professional** Free for student<br>Best choice for individuals | $97 |
| | **Business**<br>Small businesses and freelancers | $179 |
| | **Professional**<br>Agencies and developers | $269 |
| | **Agency**<br>Design a customer package | $349 |

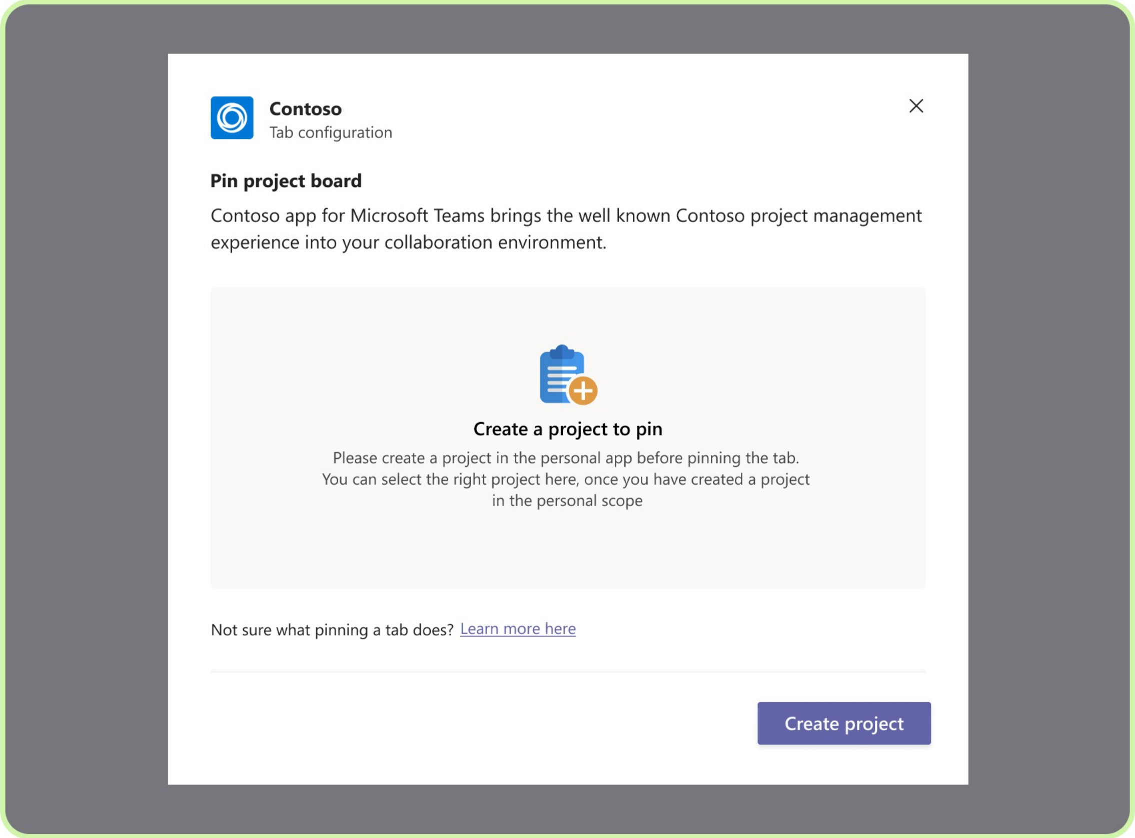
## ✓ Do: Always notify any relevant updates

Example 3: In case if you have a freemium app, do inform your users about the pricing or subscription plans once the trial period is over.

Tip: 3

# Clear next steps on Tab Configuration page

# Tab configuration



Contoso
Tab configuration

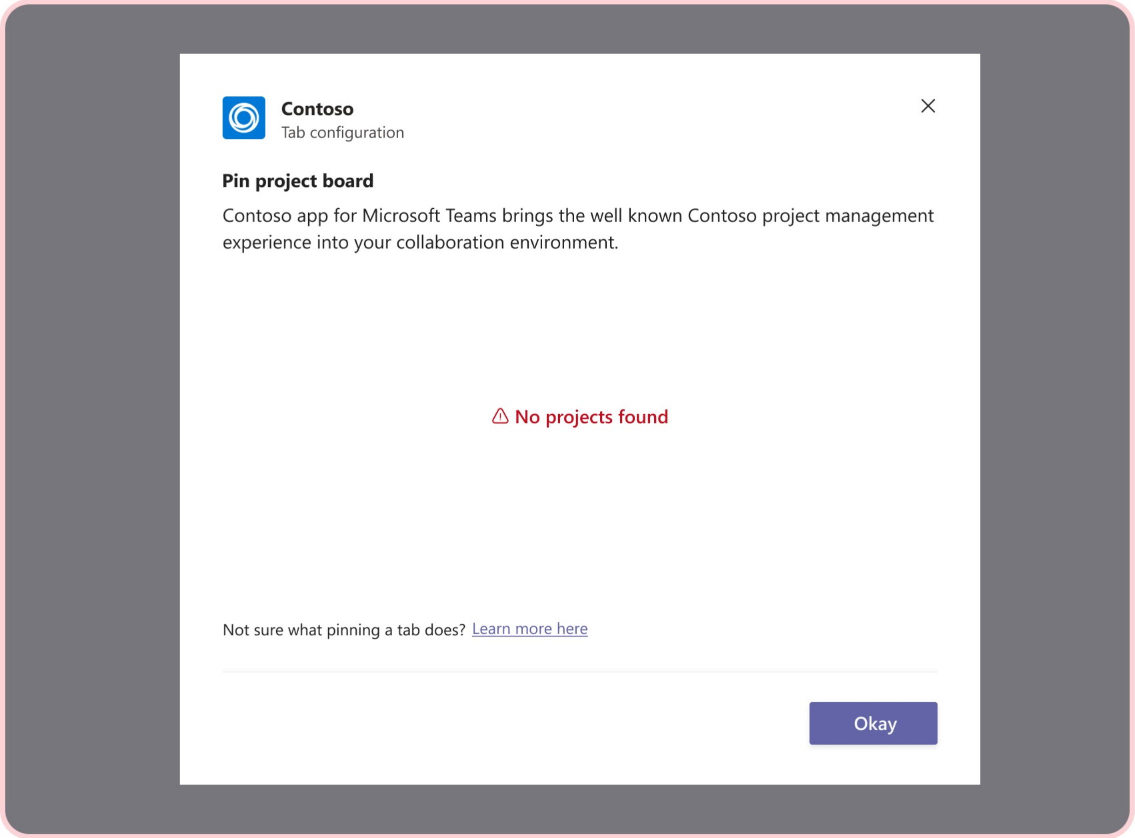
**Pin project board**

Contoso app for Microsoft Teams brings the well known Contoso project management experience into your collaboration environment.

**Create a project to pin**

Please create a project in the personal app before pinning the tab.
You can select the right project here, once you have created a project in the personal scope

Not sure what pinning a tab does? Learn more here



Contoso
Tab configuration

**Pin project board**

Contoso app for Microsoft Teams brings the well known Contoso project management experience into your collaboration environment.

⚠ No projects found

Not sure what pinning a tab does? Learn more here

## ✓ Do: Clear next steps on Tab Configuration page

If the tab configuration page requires a few steps to be done before the tab can be pinned, elucidate them clearly to the users. For instance, if a project must be created in a personal app before it can be pinned in collaborative scope, show a button to the users so that they can easily go to the bot/tab to create a board.

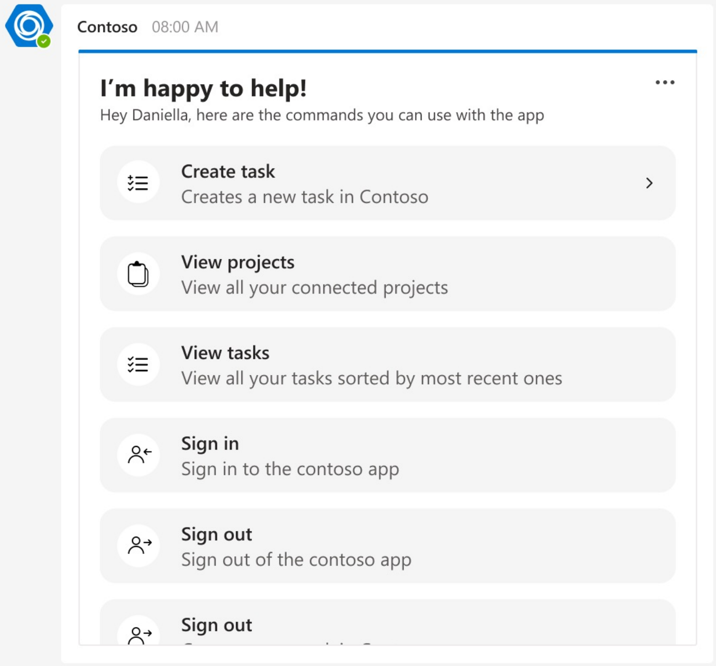
## ✗ Don’t: Show dead ends to the users on Tab Configuration page

Avoid just showing the errors on the tab configuration page without stating the reason for the error. Don’t forget to provide a CTA for the next step to resolve the problem.

Tip: 4

# Use adaptive cards for Help command

# Help card



Contoso 08:00 AM

**I'm happy to help!**

Hey Daniella, here are the commands you can use with the app

Create task
Creates a new task in Contoso

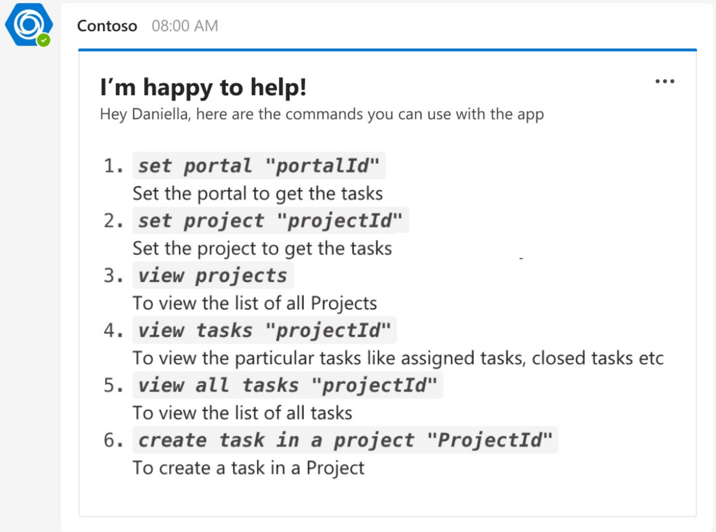
View projects
View all your connected projects

View tasks
View all your tasks sorted by most recent ones

Sign in
Sign in to the contoso app

Sign out
Sign out of the contoso app

Sign out



Contoso 08:00 AM

**I'm happy to help!**

Hey Daniella, here are the commands you can use with the app

1. `set portal "portalId"`
   Set the portal to get the tasks
2. `set project "projectId"`
   Set the project to get the tasks
3. `view projects`
   To view the list of all Projects
4. `view tasks "projectId"`
   To view the particular tasks like assigned tasks, closed tasks etc
5. `view all tasks "projectId"`
   To view the list of all tasks
6. `create task in a project "ProjectId"`
   To create a task in a Project

### ✓ Do: Use Adaptive Cards for Help command

It is recommended to use an adaptive card to display Help cards. You can either use buttons (mapping to each of the supported command) or a list card to implement this. If there are more than 6 commands, use multi-level buttons or the last button can be titled as 'More' to display other commands in the next adaptive card.

### ✗ Don't: Use just textual content for Help command

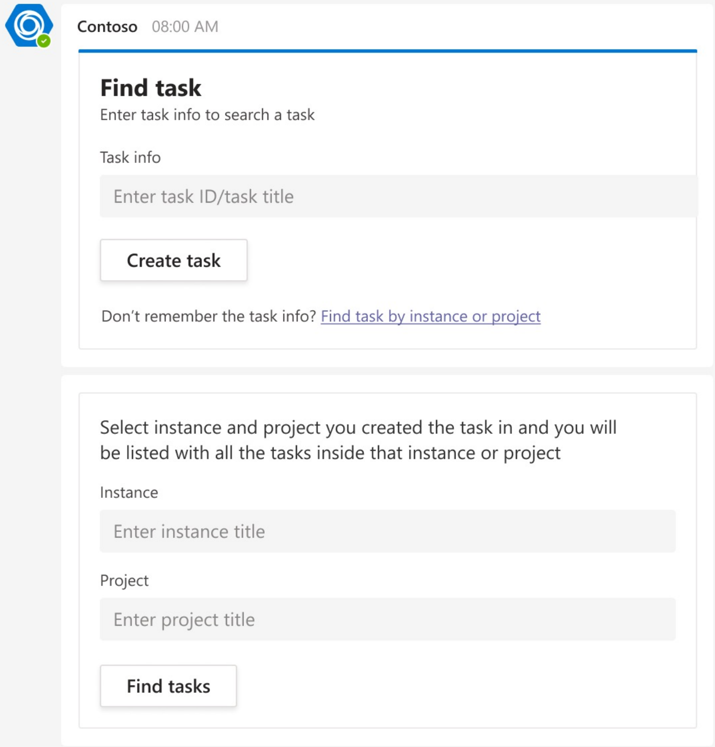
Avoid showing just the text as a response to help command. Textual content are difficult to read and inconvenient for the users to type the commands instead of just clicking on buttons or list items.

Microsoft Teams

Tip: 5

# Type less, Click more

# Type less, Click more



Contoso 08:00 AM

**Find task**

Enter task info to search a task

Task info

Enter task ID/task title

Create task

Don't remember the task info? Find task by instance or project

Select instance and project you created the task in and you will be listed with all the tasks inside that instance or project

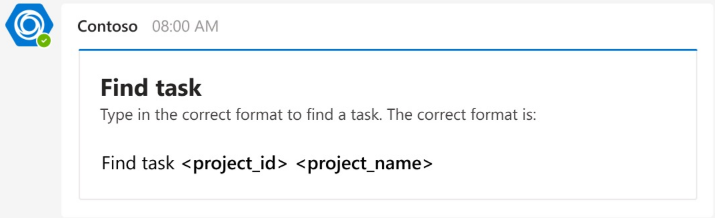
Instance

Enter instance title

Project

Enter project title

Find tasks



Contoso 08:00 AM

**Find task**

Type in the correct format to find a task. The correct format is:

Find task <project_id> <project_name>

## ✓ Do: Use Fluent UI components for user input

If an input must be taken from the user, then use input field, dropdown, radio, button and other Teams Fluent UI components for the standard or template text. Users should be asked to type only non-standard or custom text.

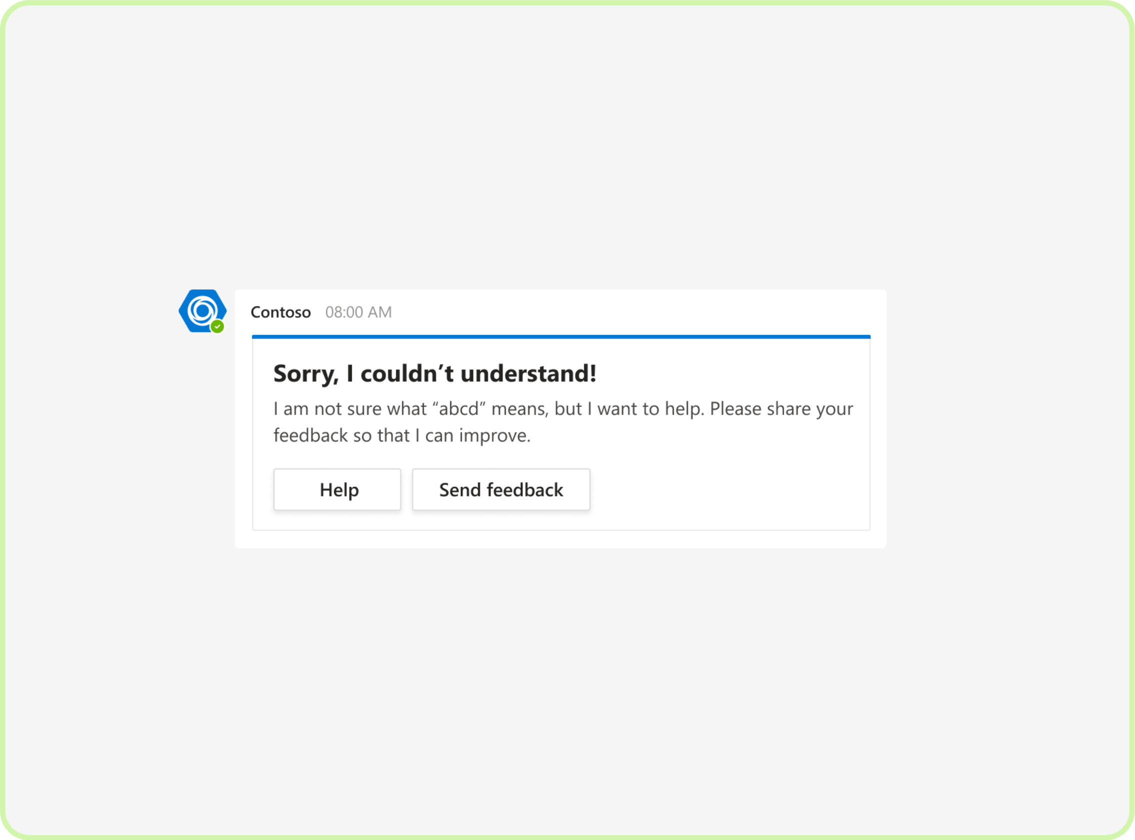
## ✗ Don't: Use complex textual command formats

Always avoid textual commands with complex formats. Such commands are difficult to remember and prone to typographical errors.

Tip: 6

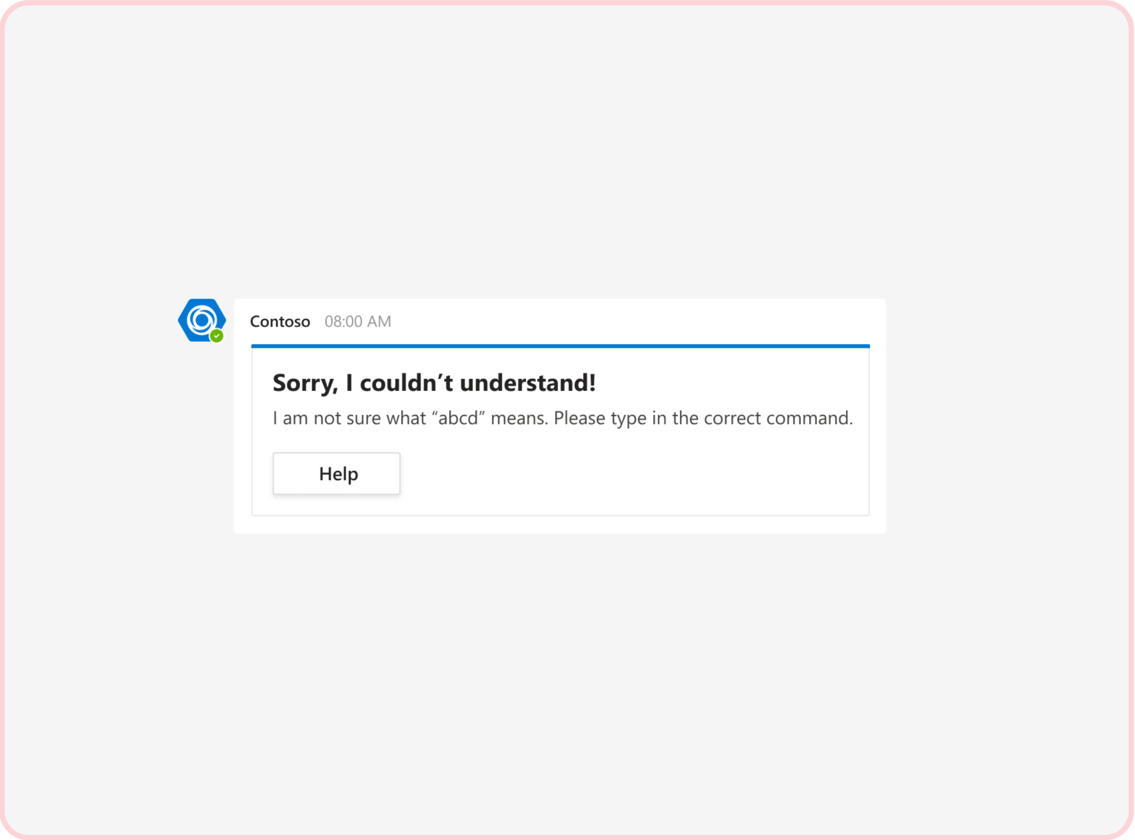
# Feedback from users

# Feedback



**Sorry, I couldn’t understand!**

I am not sure what “abcd” means, but I want to help. Please share your feedback so that I can improve.



**Sorry, I couldn’t understand!**

I am not sure what “abcd” means. Please type in the correct command.

## ✓ Do: Take feedback from users

In case the bot is unable to understand the commands typed by the user, ask users to share feedback so that suggestions and feedback can be taken directly from the users to improve the next iteration of the app.

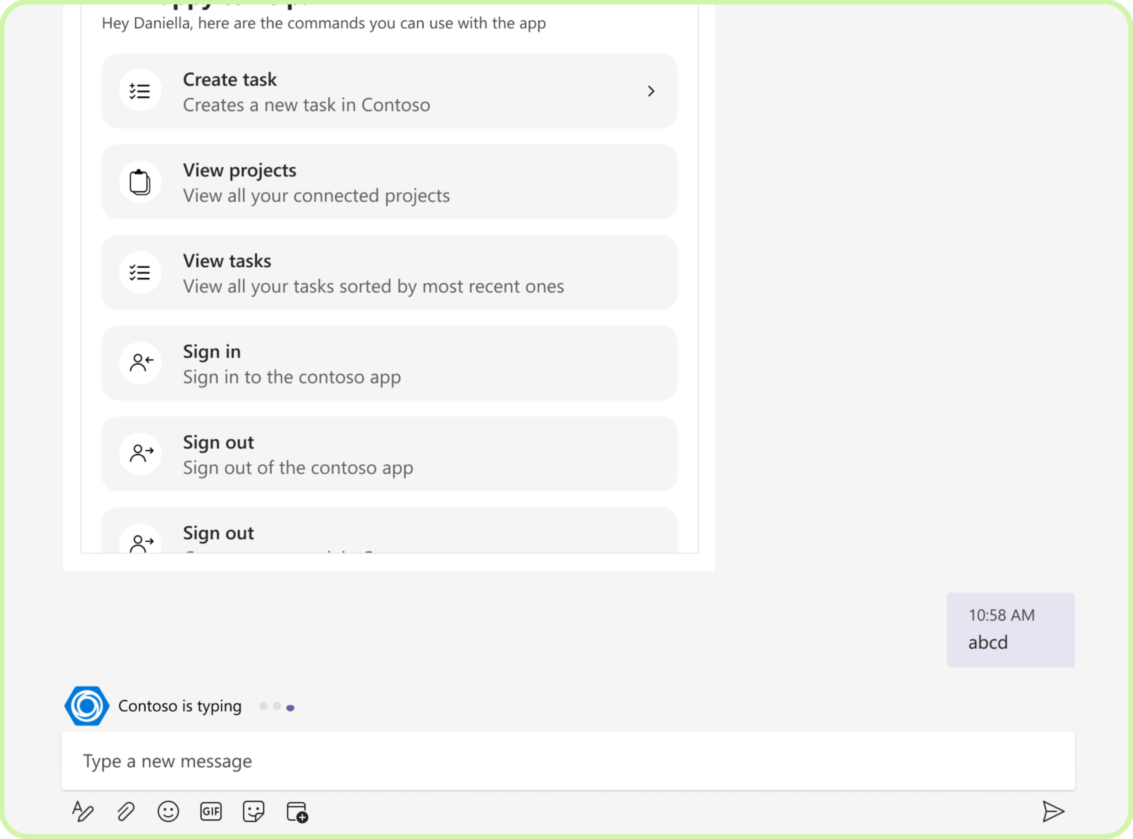
## ✗ Don’t: Miss the opportunities to take feedback

As shown here, it is a good practice to show a relevant CTA in case the bot could not understand the command. However, such events can be further leveraged to seek feedback from the users.

Tip: 7

# A responsive Bot

# Responsive bot



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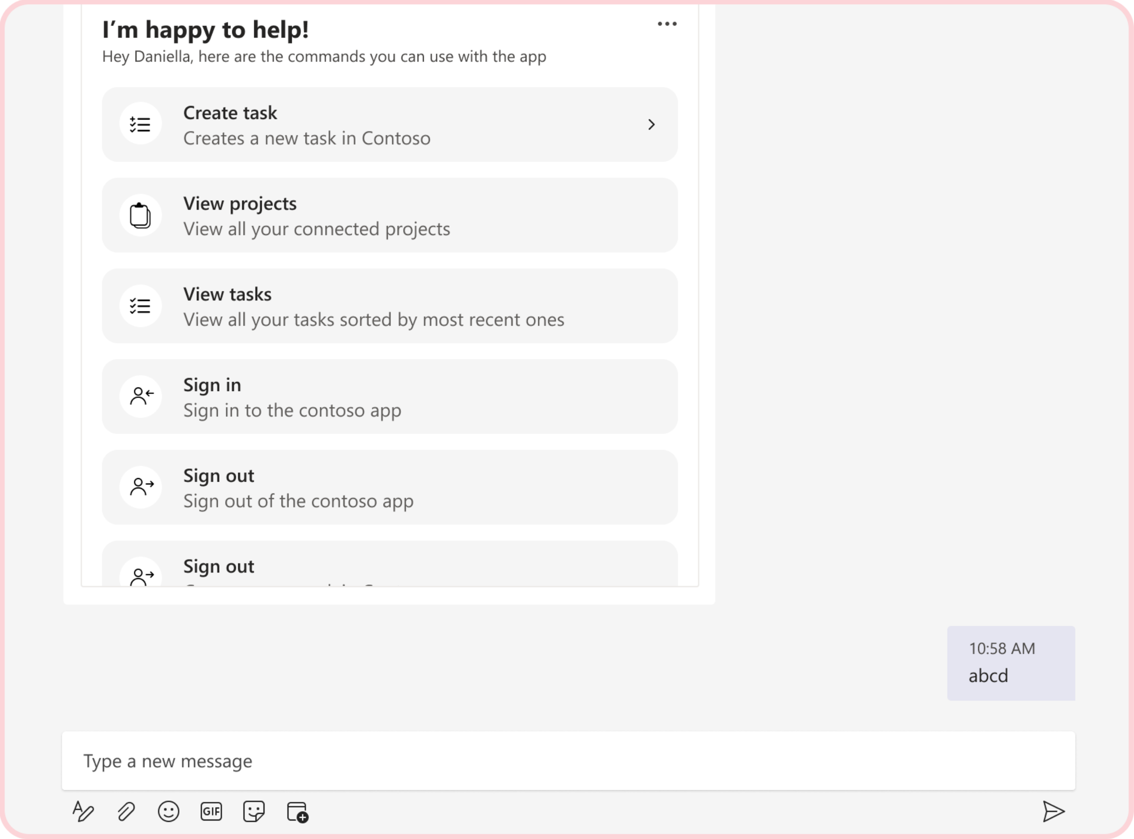
Sign in
Sign in to the contoso app

Sign out
Sign out of the contoso app

Sign out

10:58 AM
abcd

Contoso is typing



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Sign in to the contoso app

Sign out
Sign out of the contoso app

Sign out

10:58 AM
abcd

## ✓ Do: Have a responsive bot

The bot should always respond to any query within 2 seconds. In case the bot takes more time, then a typing indicator should always be indicated.

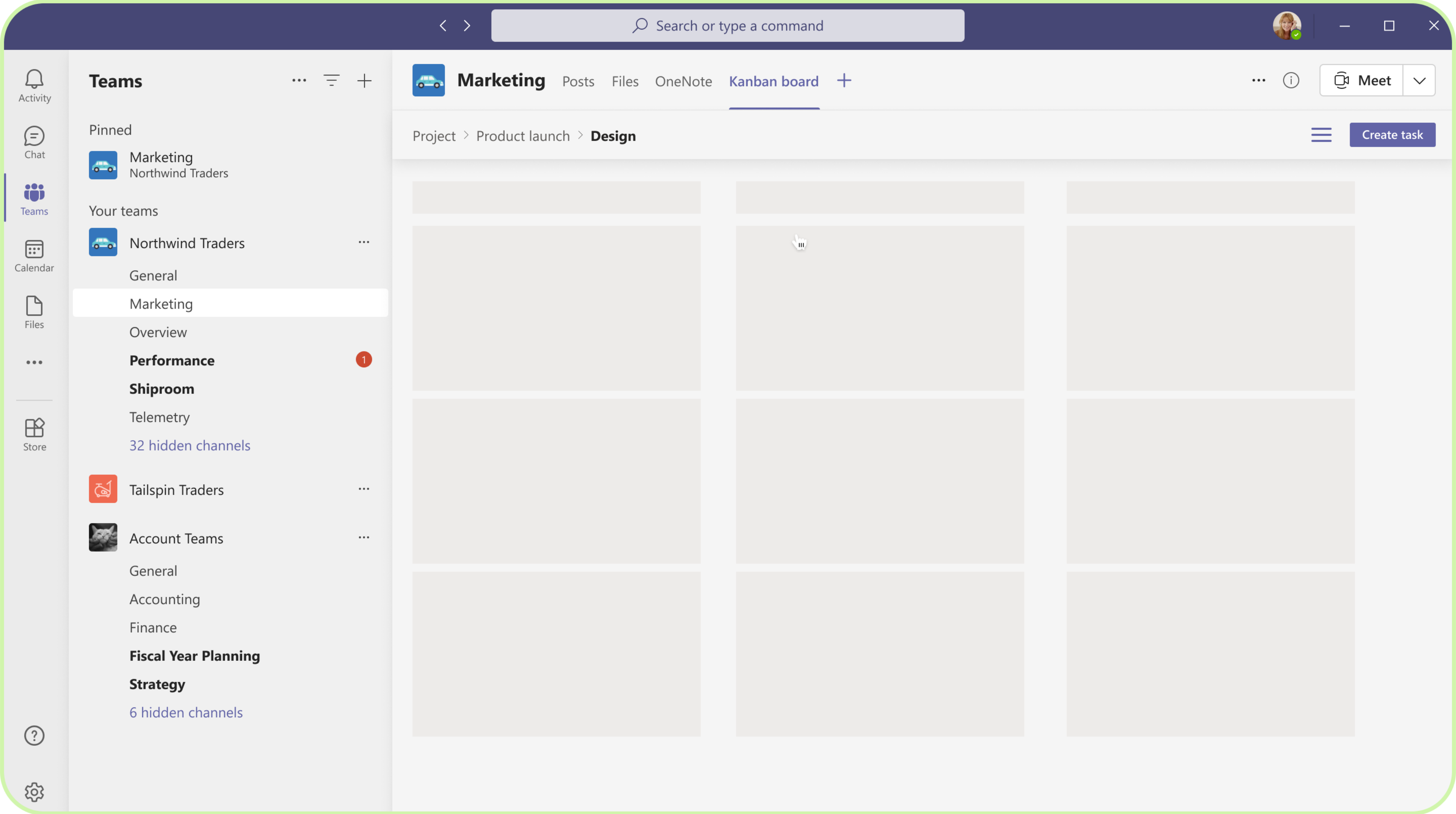
## ✗ Don't: Keep your users waiting

Avoid showing an empty field from the bot in case there is delayed response from the back-end logic.

Tip: 8

# A responsive Tab

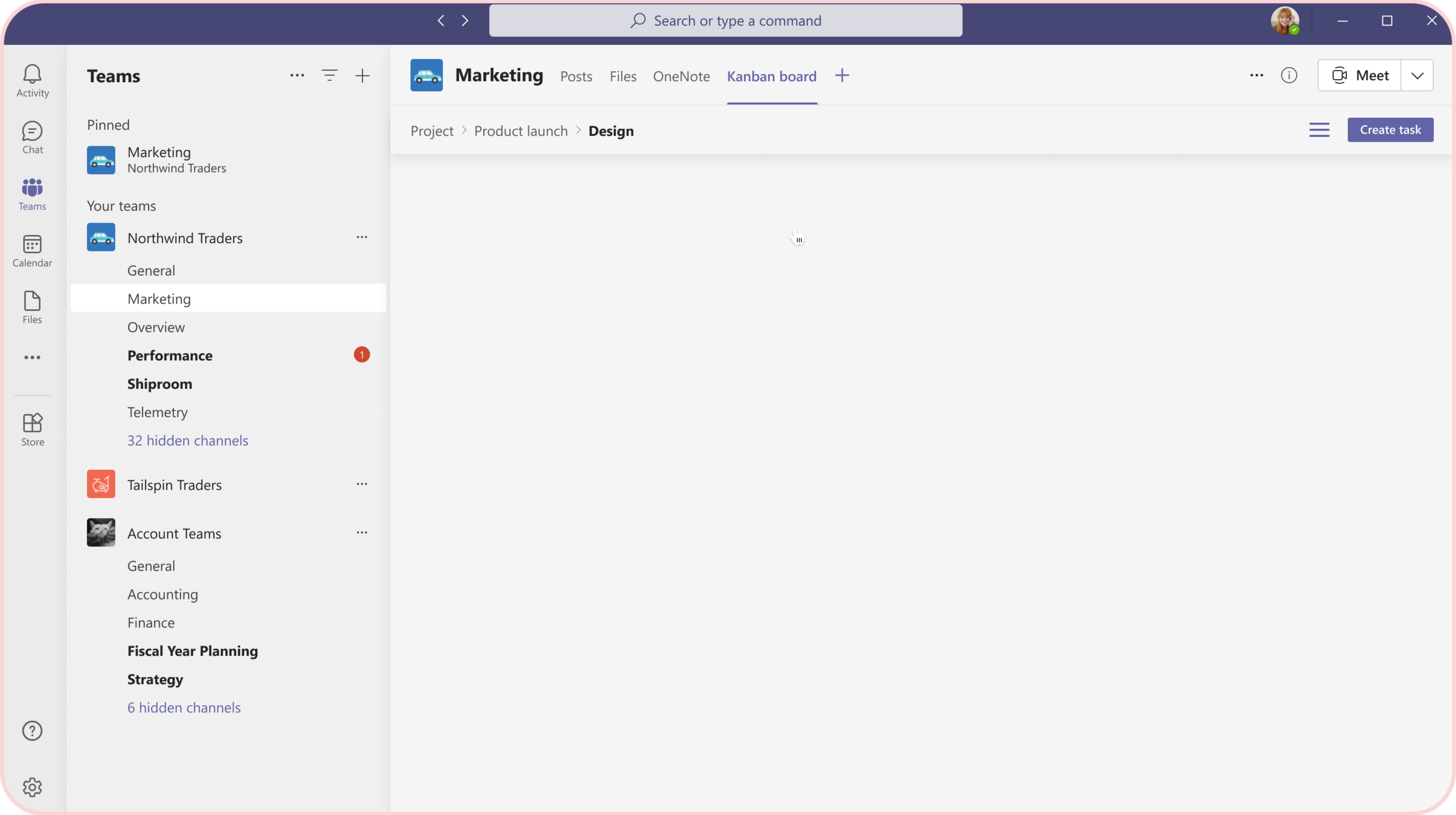
# Responsive tab



## ✓ Do: Have a responsive tab

Any tab should be loaded completely within 5 seconds. In case the tab content takes more time to load, then either show a skeleton of the page or show a loading indicator.

# Responsive tab



## Don’t: Show empty tab

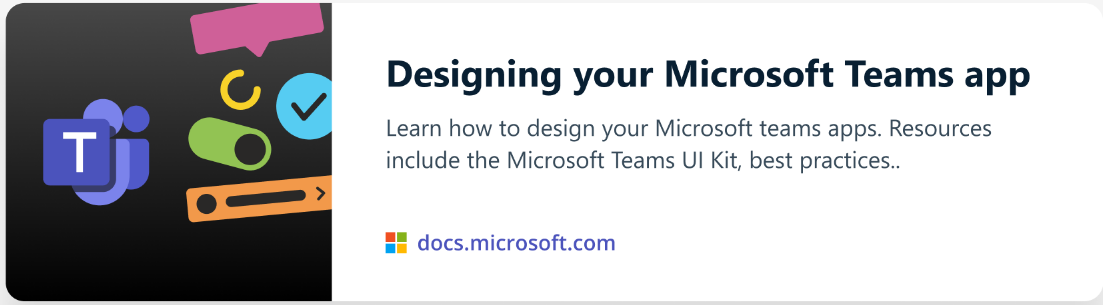
Avoid showing an empty tab in case there is delayed response from the back-end logic. Always show an active loader or tab skeleton so that the users are assured that there is data coming in.

Tip: 9

# Follow design guidelines

# Design guidelines

Wherever possible, use the Teams styled components and design guidelines for fonts, colour pallets, grid system, motion, tone of voice etc.



**Designing your Microsoft Teams app**

Learn how to design your Microsoft teams apps. Resources include the Microsoft Teams UI Kit, best practices..

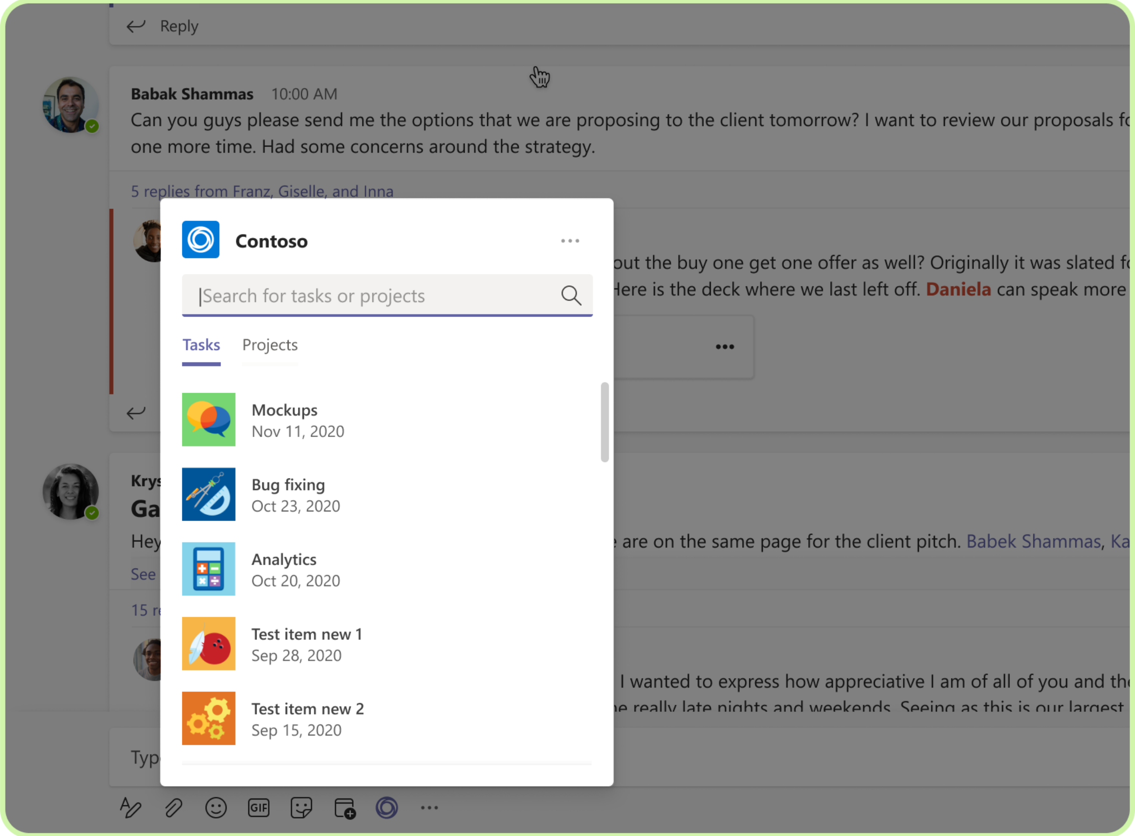
docs.microsoft.com

Microsoft Teams

Tip: 10

# Suggest queries in Message Extension

# Message extension



Babak Shammas 10:00 AM
Can you guys please send me the options that we are proposing to the client tomorrow? I want to review our proposals fo
one more time. Had some concerns around the strategy.

5 replies from Franz, Giselle, and Inna

out the buy one get one offer as well? Originally it was slated f
Here is the deck where we last left off. Daniela can speak more

Krys
Ga
Hey
are on the same page for the client pitch. Babek Shammas, Ka
See
15 r

I wanted to express how appreciative I am of all of you and th
e really late nights and weekends. Seeing as this is our largest

Typ

Mockups
Nov 11, 2020

Bug fixing
Oct 23, 2020

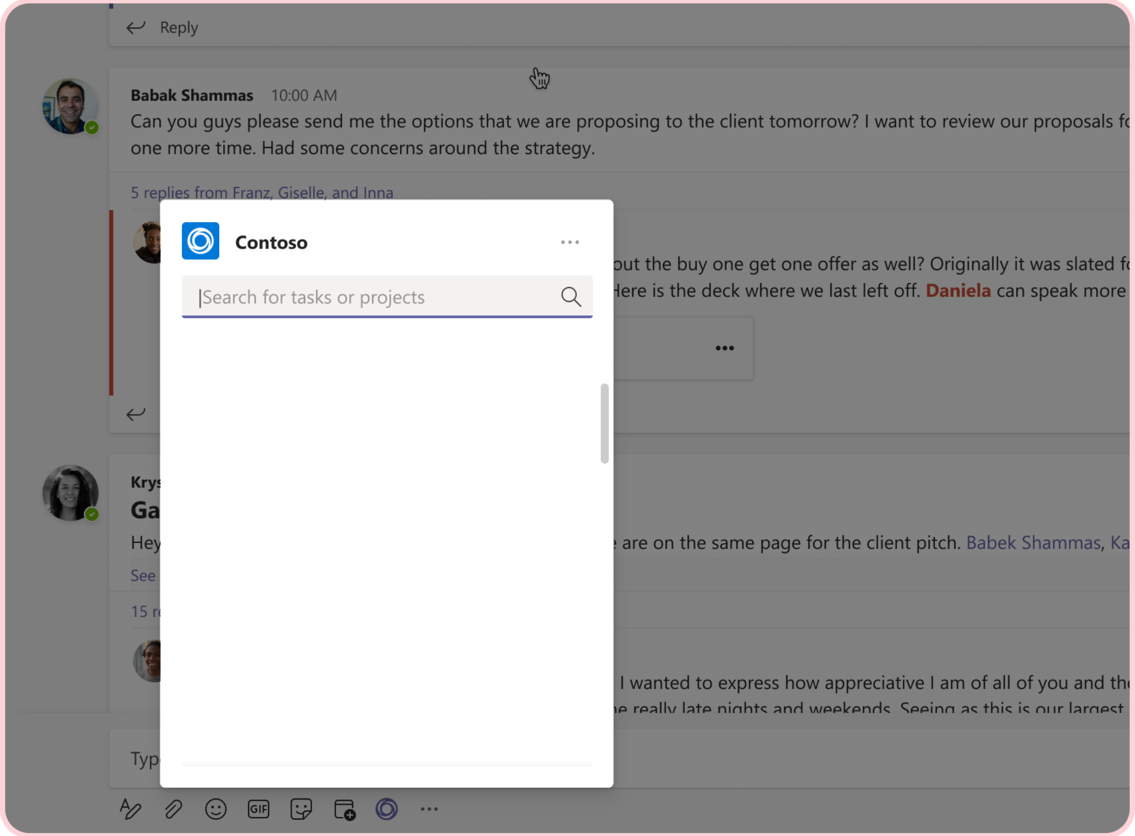
Analytics
Oct 20, 2020

Test item new 1
Sep 28, 2020

Test item new 2
Sep 15, 2020

## ✓ Do: Suggest queries in Message Extension

The search-based message extensions should provide a 0-term query such as "last used" to encourage engagement and provide short cut to the user to the last message extension used.



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Typ

## ✗ Don’t: Show an empty Message Extension screen

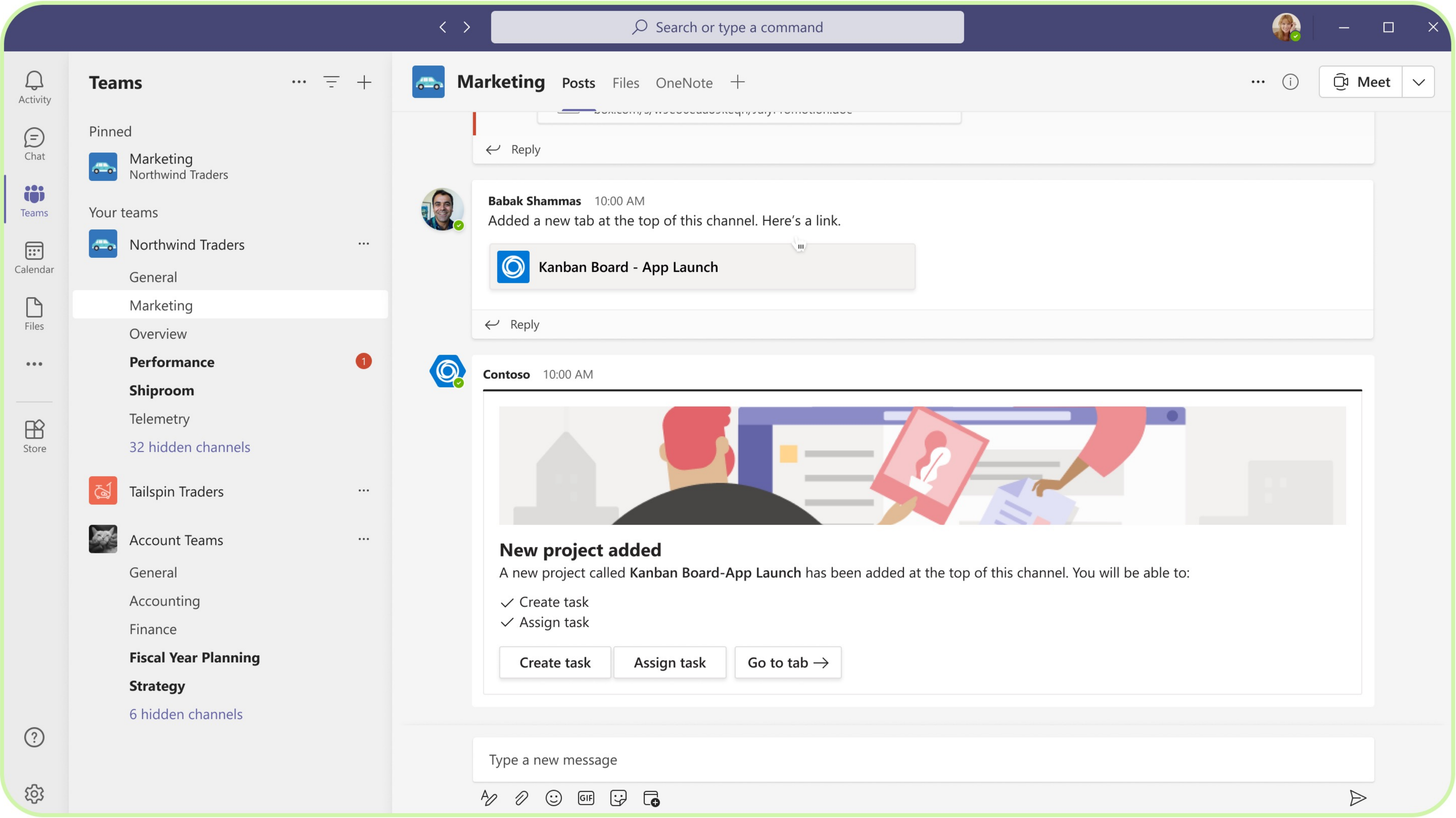
It’s a bad practice to show an empty area in Message Extension. Prompt suggestions so that users can get themselves acquainted with this capability.

Microsoft Teams

Tip: 11

# Bot must provide Tab info

# Tab info



**Babak Shammas** 10:00 AM

Added a new tab at the top of this channel. Here's a link.

Kanban Board - App Launch

**Contoso** 10:00 AM

**New project added**

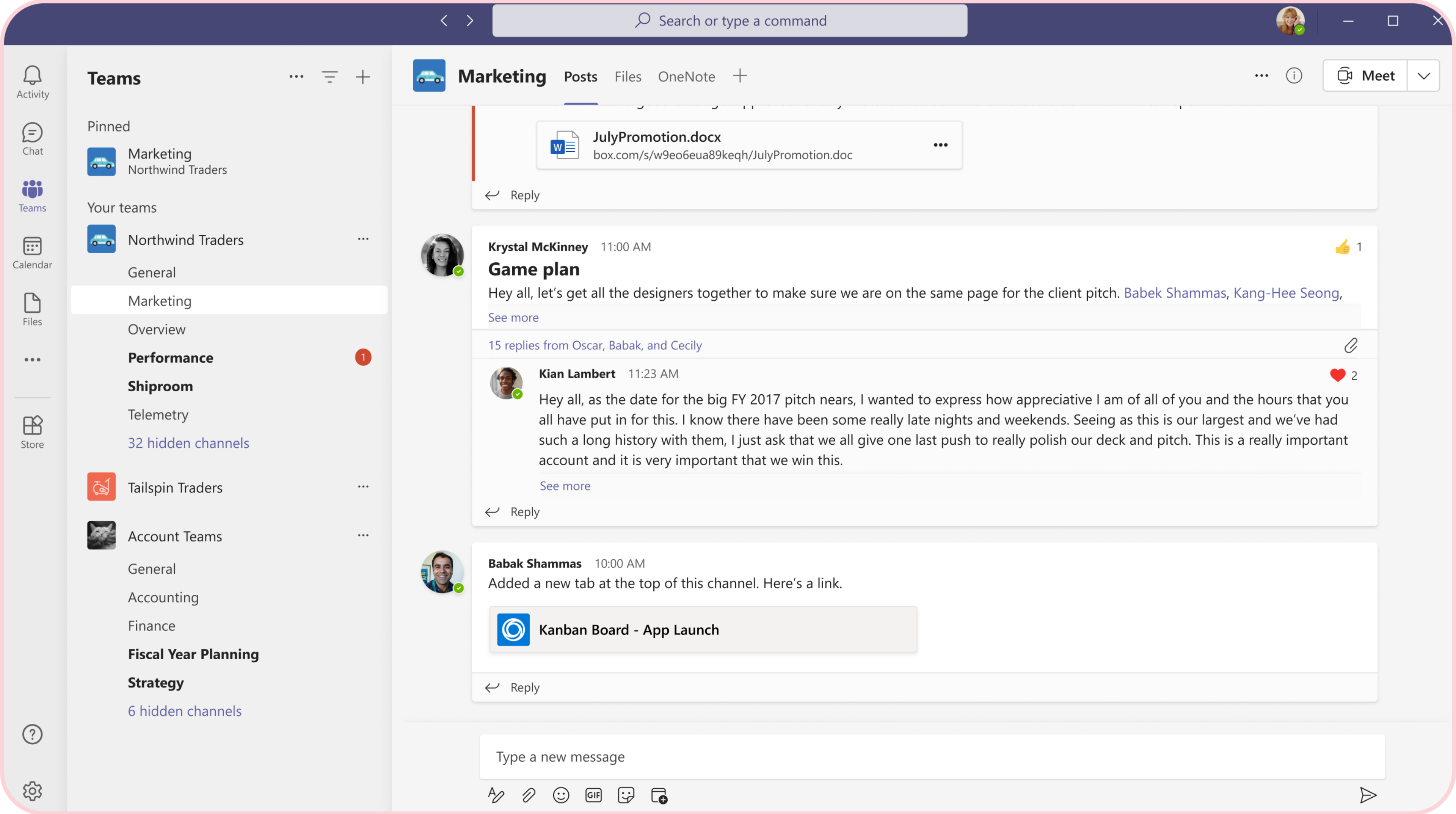
A new project called **Kanban Board-App Launch** has been added at the top of this channel. You will be able to:

✓ Create task
✓ Assign task

## Do: Provide pinned tab info via bot

If a tab has been added to a channel that has an app bot associated with it, the bot should provide content that is relevant to the tab that has been pinned.

# Tab info



JulyPromotion.docx
box.com/s/w9eo6eua89keqh/JulyPromotion.doc

Krystal McKinney 11:00 AM

**Game plan**

Hey all, let's get all the designers together to make sure we are on the same page for the client pitch. Babek Shammas, Kang-Hee Seong,

See more

Kian Lambert 11:23 AM

Hey all, as the date for the big FY 2017 pitch nears, I wanted to express how appreciative I am of all of you and the hours that you all have put in for this. I know there have been some really late nights and weekends. Seeing as this is our largest and we've had such a long history with them, I just ask that we all give one last push to really polish our deck and pitch. This is a really important account and it is very important that we win this.

Babak Shammas 10:00 AM

Added a new tab at the top of this channel. Here's a link.

Kanban Board - App Launch

### ✕ Don't: Rely on default pinned tab response

Users will never get the context of the pinned tab while reading the default message posted by Teams. Ensure that your bot also posts a welcome card as soon as your app is pinned in collaborative scope.

# Thank You